Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

SECRETARY OF THE SENATE FUBLIC RECORDS

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

2019 JUN 21 PH 2: LO

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	ule 35.2(a) and (c), I m r me. I also certify that		osures with respect to t	ravel expenses that have been or v
	•	rization (Form RE-1), rtification Form with al	AND I attachments (itinerary	, invitee list, etc.)
Private Sponsor(s) (lis	t all): The Heritage	Foundation 501(c)(3)	
Travel date(s): May 3	31, 2019			
Name of accompanying	g family member (if a	ny): None		
Relationship to Travel	er: 🗆 Spouse 🗀 (Child		
	COSTS IN EMPLOYEE		COMPANYING SPOUS itional pages if necessary	E OR DEPENDENT CHILD, ONLY .)
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate ☑ Actual Amount	\$60.00 - 32 passenger coach bus	None	\$38.00	None
Expenses for Accomp	panying Spouse or De	pendent Child (if appli	icable):	
	Transportation' Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate ☐ Actual Amount	Not Applicable	Not Applicable	Not Applicable	Not Applicable
necessary.): Attended	ed a leadership staf	f ride on the battlef e military and leade	ield in Gettysburg,	ttach additional pages if PA. We stopped at various sociated with the particular
)				
06/21/2019	Katherin	e Thompson	1/2	How House
(Date)	(Printed n	ame of traveler)		(Signature of traveler)
TO BE COMPLETE	D BY SUPERVISING	MEMBER/OFFICER:		

I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel

Authorization form, are necessary transportation, lodging, and related expenses as defined in Bule 35

06/21/2019

(Date)

Signature of Supervising Senator/Officer)

(Revised 1/3/11)

prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will <u>not</u> be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure. Katherine Thompson Name of Traveler: Senator Mike Lee Employing Office/Committee: The Heritage Foundation Private Sponsor(s) (list all):_____ Friday, May 31st 2019 Travel date(s): Note: If you plan to extend the trip for any reason you must notify the Committee. Gettysburg, PA Destination(s):_____ Explain how this trip is specifically connected to the traveler's official or representational duties: This day trip is an educational leadership staff ride conducted on the battlefield at Gettysburg. The lessons and experiences this trip will provide will bolster my ability as a staffer to think strategically, form reasoned recommendations to the member I serve on matters related to the U.S. military and national security, and allow me to further my leadership abilities by learning from the examples of the major players in the battle at Gettysburg. Name of accompanying family member (if any): Relationship to Employee: Spouse Child I certify that the information contained in this form is true, complete and correct to the best of my knowledge: May 1st, 2019 (Date) TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain): Michael S. Lee Katherine Thompson hereby authorize (Print Senator's/Officer's Name) (Print Traveler's Name) an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain. I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) May 1st, 2019

(Signature of Supervising Senator/Officer)

Form RE-1

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days

CO

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(Date)

(Revised 10/19/15)

Date/Time Stamp:

Subject:

Marshall Fellowship Update

Date:

Wednesday, May 15, 2019 at 12:18:33 PM Eastern Daylight Time

From:

Palumbo, Brandon

Attachments: 2019 Gettysburg Day Trip Agenda.pdf

Hello Marshall Fellows,

I hope you all enjoyed the alumni reception and panel discussion last week. Please take a minute to fill out the event feedback form linked below. We are constantly looking for ways to improve our programs and your feedback is a great help.

Alumni Reception and Panel Feedback

The next Fellowship event is our day-trip to Gettysburg National Military Park on Friday, May 31st. I have attached the trip's itinerary here. We will be leaving from Heritage early Friday morning (breakfast will be provided) via bus and will be arriving back to D.C. in the evening so please dress comfortably. Last year we were lucky to have clear skies, but I would bring something like an umbrella or a jacket in case of rain.

I hope you all have managed to read *Killer Angels* as well as get into some of the reading material that our Gettysburg guide, Colonel Tom Vossler, sent us. Throughout the battlefield tour you will be asked various questions about the actions and strategies of your assigned historical personalities, so be prepared!

I am looking forward to seeing you all again. Please let me know if you have any questions.

Sincerely,

Brandon Palumbo

Brandon Palumbo

Program Associate, Congressional Relations
The Heritage Foundation
214 Massachusetts Avenue, NE
Washington, DC 20002
202-675-1784
heritage.org

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

Descrin	It is an educational day trip to inform staff about strategic leadership and the
principl	tion of the trip:es of grand strategy in the historical context of the Gettysburg battlefield.
Dates o	Friday, May 31, 2019 f travel:
	Gettysburg, PA
Name a	See attached. nd title of Senate invitees:
l <i>certify</i>	that the trip fits one of the following categories:
emp	The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or ploy registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign acipal will accompany the Member, officer, or employee at any point throughout the trip.
emp	The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or bloy one or more registered lobbyists or agents of a foreign principal and the trip meets the uirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
_	rtify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign acipal.
or in fore	ertify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly not received for the purpose of financing this specific trip from a registered lobbyist or agent of a eign principal or from a private entity that retains or employs one or more registered lobbyists or ents of a foreign principal.
certify	that:
	trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or not of a foreign principal except for de minimis lobbyist involvement.
	traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal ept as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

9.	USE ONLY IF YOU CHECKED QUESTION 6(B) I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a
	foreign principal, one of the following scenarios applies:
	(A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip.
	(B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
10.	USE ONLY IF YOU CHECKED QUESTION 9(B) If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
11.	An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip.
12.	Briefly describe the role of each sponsor in organizing and conducting the trip:
	As the sole sponsor of the trip, The Heritage Foundation has planned and will host the trip. Heritage's
	interest in hosting the event – per our mission below - is to provide a forum for discussion public policy
	as well as how we may learn and apply the decisions of the past to the issues of today.
13.	Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission: The Heritage Foundation is a research and educational institution whose mission is to formulate and
	promote conservative public policy ideas. We are hosting this trip to further educate the attendees on the
	lessons of the past and how they apply to strategic leadership and grand strategy today.
14.	Briefly describe each sponsor's prior history of sponsoring congressional trips:
	The Heritage Foundation has a long history of sponsoring congressional travel including trips to the
	historic Gettysburg battlefield, the Virginia Military Institute, and the National Museum of the Marine
	Corps at Quantico.

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The Hentage Found	dation provides public so	eminars at our head	Iquarters for the public	to discuss way
further our mission.	Heritage also has staff	throughout the cou	ntry to meet with citizer	ns regarding is:
that are being deba	ited in government or so	ciety and large.		
Total Expenses for I	Each Participant:			
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expens
Good Faith estimate Actual	\$60.00 - 32 passenger bus	None	\$38.00 - Breakfast, Lunch, Dinner	None
Amounts				
State whether a) the	trin involves an event th	nat is arranged or or	agnized without receive	to congression
participation or b) the congressional partic	trip involves an event the trip involves an event ipation: event that is organized	that is arranged or	organized specifically	with regard to
participation or b) the congressional partice. The trip involves an	he trip involves an event ipation: event that is organized	that is arranged or specifically with reg	organized specifically	with regard to
participation or b) the congressional partice. The trip involves an Reason for selecting.	he trip involves an event ipation:	that is arranged or specifically with reg	organized specifically spard to congressional p	with regard to
participation or b) the congressional partice. The trip involves an Reason for selecting. Gettysburg was selecting.	he trip involves an event ipation: event that is organized the location of the even	specifically with reg	ard to congressional parents of strategic leader	ership that can
participation or b) the congressional participation. The trip involves an Reason for selecting Gettysburg was selecting applied today. It is a	he trip involves an event ipation: event that is organized the location of the even ected due to its rich hister	specifically with reg	ard to congressional parents of strategic leader	ership that can
participation or b) the congressional partice. The trip involves an Reason for selecting. Gettysburg was selecting applied today. It is a Name and location of the congressional partice.	he trip involves an event ipation: event that is organized the location of the even ected due to its rich histern ideal place to utilize a	specifically with reg	ard to congressional parents of strategic leader	ership that can
participation or b) the congressional participation. The trip involves an Reason for selecting Gettysburg was selecting applied today. It is a Name and location of None provided	he trip involves an event ipation: event that is organized the location of the even ected due to its rich histern ideal place to utilize a	specifically with reg	ard to congressional parents of strategic leader	ership that can

21.	Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:
	The expenses for meals and travel arrangements are below the per diem rates.
22.	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:
	A 32 passenger coach bus will be chartered.
23.	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).
24.	List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event: None provided.
25.	I hereby certify that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you must include a completed signature page for each additional sponsor): Signature of Travel Sponsor: B780944A7E374B3.
	Thomas Binion, Vice President of Government Relations Name and Title:
	The Heritage Foundation 501(c)3 Name of Organization:
	214 Massachusetts Ave. NE, Washington, D.C. 20002 Address:
	Telephone Number: (202) 608-6188
	Fax Number:
	Thomas.Binion@heritage.org E-mail Address:

5. Name and title of Senate invitees:

Name	Position	Office
Nicolas Adams	National Security Advisor	Senator Joni Ernst
Halie Craig	Legislative Assistant	Senator Pat Toomey
Katherine Thompson	Legislative Correspondent	Senator Mike Lee
Michael Callesen	Legislative Correspondent	Senator Rob Portman
Aaron Strickland	Deputy Military LA	Senator Lindsey Graham



Friday, May 31, 2019 Gettysburg National Military Park

7:15 a.m.

Bus Arrives

Washington, D.C.

The Heritage Foundation
214 Massachusetts Ave NE

7:30 a.m.

Fellows Check-In and Load Bus

8:00 a.m.

Bus Departs

8:00 - 10:00 a.m.

Travel to Gettysburg, PA

Dr. Steve Bucci gives strategic overview

*This trip is to provide the Fellows with the opportunity to study American military leadership and strategy in the context of the American Civil War. Each Fellow is expected to learn what exactly the tactics and strategies of the Battle of Gettysburg's historical participants were at the time. The battlefield guide, Colonel Tom Vossler (Ret.), will constantly be asking the Fellows questions about why certain actions were taken and how they can apply that knowledge in their current roles. As national security and foreign policy professionals, this relates to their official duties by increasing their knowledge of U.S. government policies and their historic ramifications.

10:00 - 11:30 a.m.

McPherson's Ridge

Gettysburg, PA

Forenoon First Day of Battle

*During the first stop at McPherson's Ridge, Colonel Tom Vossler (Ret.) will show the strategic locations of U.S. military forces, and ask the Fellows to briefly present their knowledge of specific people and/or events during the first day of the battle. This relates to their official duties by demonstrating to the Fellows how tactics and strategy are enacted in real time.

11:30 - 12:00 p.m.

Oak Hill/Oak Ridge/Seminary Ridge

Pick up box lunches from Biggerstaff's

*During the second stop at Oak Hill, Colonel Tom Vossler (Ret.) will teach the Fellows about how the terrain of the surrounding area affected the people at the time. The Fellows will be asked to give recommendations on how the historical figures could have dealt with the problems they faced. This relates to their official duties by demonstrating how geography can still affect policymaking.

12:00 - 12:45 p.m.

Lunch at The Refectory (Lutheran Seminary)

Leadership Challenge

*The lunch break will include the "leadership challenge" led by the battlefield guide, Colonel Tom Vossler (Ret.). Colonel Vossler will ask each of the Fellows about their assigned material including the rationale of historic policymakers. This relates to their official duties by demonstrating to the Fellows how the decisions of key historical figures were able to shape the outcome of their implemented strategies.

12:45 - 1:45 p.m.

Seminary Ridge

North Carolina Memorial

^{*}During the fourth stop at the North Carolina Memorial, Colonel Vossler (Ret.) will give a lecture about how

and where the Confederate army positioned itself during the battle, and explain the historical context in which the U.S. federal government was making policy decisions. Each of the Fellows will once again be asked to present their knowledge of historic policies and how that knowledge can be applied today. This relates to their official duties by demonstrating to the Fellows how policies can be influenced by individuals, and how they can utilize that in their current roles.

1:45 - 2:00 p.m. Bus Travel

2:00 - 3:15 p.m. Little Round Top

Second Day of Battle

*During the fifth stop at Little Round Top, Colonel Vossler (Ret.) will give a lecture about how the circumstances on the battlefield had changed since the beginning of the battle. The Fellows will be asked to talk about the historic positions of Union and Confederate military forces on the second day of the Battle of Gettysburg. This relates to their official duties because it demonstrates how initial strategies must be flexible enough to adapt to changing situations in their current roles.

3:15 - 3:30 p.m. Travel to The Angle

3:30 - 4:30 p.m. The Angle/High Water Mark

Third Day of Battle

*During the sixth stop at The Angle, Colonel Vossler will ask each of the Fellows about how Confederate General Robert E. Lee's and General Longstreet's personal relationship affected their official duties as policymakers. The Fellows will be expected to contextualize the relationship by explaining the individual decisions that were made and how others interpreted those decisions. This relates to their official duties by showing how personal matters can actually affect professional environments.

4:30 - 4:45 p.m. Bus Travel

4:45 – 6:30 p.m. **Dinner**

Mountain View Farm Summary & Conclusion

*The final stop at Mountain View Farm will be a discussion over dinner between the Fellows and Colonel Vossler (Ret.) that will include a review of how what the participants learned about their assigned material can be applied in their own lives, e.g., how the physical movement of military forces affects what policy goals can be achieved. This relates to their official duties by allowing participants to learn from examples of historic policymakers and how those lessons can be utilized in their current roles.

6:30 - 8:00 p.m. Travel back to Heritage

Washington, D.C.